

Directions for Installing and Using the Counsel Appointment System Excel Template

The Excel template is provided for the Counsel Appointment System and allows a court user to enter counsel appointment data in the order specified in the upload file format document. When the macro is run, the Excel file will be exported in the format required by the upload process.

To Install the Template:

1. Click the CAS.xlt link on the Downloads page.
2. When prompted save the file to your desktop.

To Use the Template:

1. Double-click the CAS.xlt icon on your desktop.
2. When prompted click 'Enable Macros' (see “Enabling Macros” below if you receive a warning instead).
3. Enter counsel appointment data.
4. Select File > Save to save the Excel file.
5. Press Ctrl+E to run the export or select Tools > Macro > Macros... > QuotedExport > Run.
6. Select the location and name of your file in the dialog box.
7. Click 'Save'.
8. Click 'OK'.

Note:

The worksheet and workbook are protected. All fields are locked except for the fields that make sense for data. Some formatting of numbers was added, but in general no data verification was done. In addition, worksheets cannot be added or deleted.

Enabling Macros:

If you receive a warning upon opening the template that “Macros in this workbook are disabled because the security level is high...” follow the steps below.

1. Click Tools > Options.
2. Click the Security tab.
3. Click the Macro Security button.
4. Select the Medium security level and click OK.
5. Close Excel and then re-open the template.
6. Continue with step 2 under “To Use the Template”.